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AUTHOR Lennon, Gale G.
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ABSTRACT

To help educational administrators, this guide offers strategies and instruments for performing an internal review of school district management. It also provides guidelines for external reviews and briefly mentions followup procedures. After discussing the purposes and uses of school management reviews, the author identifies 32 types of historical and current data to be collected for an internal review and provides 21 sample data collection instruments, involving such areas as the governing board, administrative turnover, pupil-teacher ratios, dropout rates, test scores, ethnic composition, finances, courses, and enrollment. The author also adds a rating sheet on administrators' philosophy and procedures as well as questions analyzing district administration and procedures in 17 areas, including philosophy, objectives, nondiscrimination, task analysis, responsibilities, communication, inservice activities, salaries, evaluation, effectiveness, curriculum improvement, and community relations. Two further sets of 13 and 12 questions, respectively, are focused on facilities for district and building administrators. The author's summary of the internal review offers space for identifying areas of improvement and actions to take. The section on external reviews discusses the establishment of an external review committee, areas to review, and committee written and verbal reports. Sample external review committee reports are provided. (RW)

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Strategies for the

IMPROVEMENT OF SCHOOL MANAGEMENT

The Internal Review -

The External Review

EA 015 375

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OVERVIEW

First, the PURPOSE of the following is NOT TO EVALUATE anyone or anything. It is NOT an ACCOUNTABILITY instrument. It is a self-improvement guide.

The three PURPOSES ARE:

1. to provide recommended strategies and materials that will enable a local superintendent and his/her staff and Governing Board to internally review the system and its operation, to record historical data and projections in a variety of appropriate areas, to analyze that data and to develop

   a. plans for perceived improvements, and

   b. plans that will promote increased stability and continuity within the system

2. to provide guidelines for securing and conducting an external review, and

3. to recommend procedures that will follow the external review.

Each component of the recommended procedure is voluntary and may or may not be completed at the discretion of the local school administration. Additional areas of local concern may also be considered at the discretion of the local school administration.

In brief, the following internal review process enables each school district to:

1. Record historical data in a logical format,
2. Record certain pertinent data projections,
3. Analyze the data; and
4. Develop improvement plans for the district.

The recommended optional external review process enables each school district to organize an external review committee whose members are "hand picked" by the local superintendent and his/her designees. It enables the external review committee to review the accumulated data and recommend areas and procedures for further improving the school operation from an administrative perspective.

The external review process should enable the local school district to secure the expertise of a broad range of school management experts and practitioners at a very nominal cost. This process is similar to the Loaned Executive process used by numerous other governmental, benevolent and business organizations. It is also somewhat comparable to the procedure used by regional accrediting organizations.

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INTRODUCTION

The purposes and benefits of a school management internal and external review are multifold. First, the internal review enables the local school administration to critically look at the school district's own data base, its management organization and perceived needs and to develop and implement strategies for meeting these changing needs of the district. Second, the external review enables the district managers to secure the management recommendations of review committee members who should be educational experts. These opinions and ideas can be added to the current excellent ideas of the local administration to further improve the management of the local schools. Third, the use of the internal and external reviews can provide the vehicle for long range planning and for providing a blueprint for management consistency and stability of district goals and procedures.

It is unrealistic to assume that each local superintendent can, as an individual, conceive and develop every possible management technique. The internal review and the external review are strategies designed to assist the local superintendent in critically analyzing his/her own school operation and, if (s)he chooses, asking a team of peers and colleagues to validate the internal review and to suggest techniques that will further improve the management of the schools.

The superintendent who chooses to review his/her management operation will, perhaps for the very first time, compile data that will give him/her a total, graphic picture of the components of the district to be managed, the person(s) responsible for managing each component, the district's human and physical resources, operational history and data and program projections. These can be used by the superintendent to develop long range plans. If an External Review Committee is also used, the committee members should be capable of providing a wealth of strategy recommendations for meeting the challenges ahead.

Why are historical data analysis, data projections and long range planning of concern? First, if I were a governing board member, I would certainly want to be assured that I could access historical data, data projections and plans to meet the potential challenges of the future. This would enable me to make better decisions now and in the future. More improtant, there would be a specific plan developed and on paper so I could monitor progress toward

specific goals. In the event the superintendent left the district, his/her replacement would have an established, previously accepted, long range operational plan readily available. The educational system should continue to operate smoothly and consistently and be able to keep on target during the transition from departing superintendent to replacement superintendent. Second, most schools are highly political organizations. The school organization responds to the directions dictated by the current vocal segment of the community through its governing board. Single, or narrowly constricted emotional issues have been known to take precedence over the more mundane, long term issues. The result of this response to varied emotional issues is a school system whose administrators and programs are buffeted from position to position and program to program by opposing forces within the community and/or the Board. It is difficult, under the above conditions, to develop and conduct an educational program whose foundation is firm and stable and whose components are modified by carefully planned evolutionary change rather than erratic revolutionary change. The latter is difficult to direct, difficult in which to measure effectiveness and seems, always, to be accompanied by substantial quantities of turbulence that drains administrator and staff energy and effort away from the management and delivery of a consistent, stable, high quality educational program.

Use of the internal review or the combination internal/external review strategy will provide a written, hopefully Board accepted, basis for long range planning for a consistent, stable educational operation. If this written plan is kept in the active file, is used as new board member candidate orientation information and is reviewed with the Board and total administration frequently (semi-annually or annually), it will tend to keep the long range goals visible and everyone on target. It will immediately let every board candidate know that long range planning has taken place and can be used as a yardstick for measuring progress toward established goals. It will, therefore, provide a readily available 1) document for Governing Board member and administrator review; and, 2) guide for transition from administrator to administrator. It will be more difficult for limited issue forces to redirect the system in an erratic manner and will enable the community, the board, the administrators and other employees to know where the district is going and to plan strategies for achieving the predetermined goals. This does not mean a board and administration should set district goals that can never be modified. It does mean a set of goals has

been established and efforts to achieve them are less likely to be deflected by the introduction of personnel changes or divergent, erratic, emotional opinions or issues.

PURPOSE OF THE HANDBOOK

The purpose of the handbook is to provide suggestions for its use in the internal and external review process. Suggestions for conducting the internal review by the Superintendent and his/her staff and for conducting the external review by a visiting committee are also presented. It should be understood that procedures may vary from school to school and state to state.

The Management Improvement Process

The Management Improvement Process is divided into three categories:

I. The Internal Review

II. The External Review

III. The Followup Activities

The Internal and External Review data can be collected and categorized in the following general classifications:

I. Management philosophies and personnel. This classification would include:

Board policies manuals and administrative handbooks
The District Philosophy
Academic (building) level or other available philosophies
District goals and objectives (EPTF and PER in Minnesota)
Current annual Board/District goals and objectives
Goal statements at all levels of administration and services delivery
Job descriptions for all employees
Any documents specifying responsibility and authority of individual administrators/supervisors
Evaluation forms and criteria at all levels of employment
All employee Master Contracts and/or policies
Board agendas
Board minutes
Management Information Systems (MIS): 1) Business Management, 2) Instructional Management
Regional Accrediting Association Validation Reports by building and reviews and audits of curricular and/or operational areas
Demographic Data: Current Administration
Governing Board History
Administrative Turnover History
Other Employee Turnover History

II. Financial and student data:

Fiscal policies and procedures
Student dropout rate history
Non-public School Enrollment History
Employer/Student/Building History
Financial History
District-wide Pupil/Teacher Ratio History
History of Pupil/Teacher Ratio by Building: elementary, middle school/junior high, senior high school

History of Pupil/Teacher Ratios for other Organizational Patterns and/or groups
Analysis of Standardized Test Scores
History of Courses/Activities Dropped and/or Added
Future Plans - Courses/Activities to be dropped and/or added
Long Range Enrollment and Financial Planning

III. Personnel supervision and improvement:

A. Management Information Systems (MIS):
   1. Business Management
   2. Instructional Management
B. Administrative Philosophy and Procedures
   1. District wide
   2. By building
   3. Administrative improvement
   4. School staff improvement
   5. Instructional and support services improvement

IV. Facilities:

Adequacy of Administrative Facilities
1) Central Administrative Offices
2) Building Administrative Offices

It is suggested that about 60% of the review team be assigned as a team to classification I, 20% to classification II, and 10% each to classifications III and IV.

Data to be Collected and Reviewed

Collect and assemble the following materials in chronological order:

1. Board policies manuals and administrative handbooks
2. The District Philosophy
3. Academic (building) level or other available philosophies
4. District goals and objectives (EPTF and PER in Minnesota)
5. Current annual Board/District goals and objectives
6. Goal statements at all levels of administration and services delivery
7. Job descriptions for all employees
8. Any documents specifying responsibility and authority of individual administrators/supervisors
9. Evaluation forms and criteria at all levels of employment
10. All employee Master Contracts and/or policies
11. Fiscal policies and procedures
12. Board agendas
13. Board minutes
14. Management Information System (MIS):
    a) Business Management
    b) Instructional Management
15. Regional Accrediting Association Validation Reports by building and other reviews and audits
16. Demographic Data: Current Administration
17. Governing Board History
18. Administrative Turnover History
19. Other Employee Turnover History
20. Student Drop Out Rate History
21. Non-Public School Enrollment History
22. Employee/Student/Building History
23. Ethnic Composition by Building History
24. Financial History
25. District Wide Pupil/Teacher Ratio History
26. History of Pupil/Teacher Ratio by Building: elementary, middle school/ junior high, senior high school
27. History of Pupil/Teacher Ratios for other Organizational Patterns and/or Groups
28. Analysis of Standardized Test Scores
29. History of Courses/Activities Dropped and/or Added
30. Future Plans - Courses/Activities to be Dropped and/or Added
31. Long Range Enrollment and Financial Planning

31. Administrative Philosophy and Procedures
    a. District Wide
    b. By Building
    c. Administrative Improvement
    d. School/Staff Improvement
    e. Instructional and support services improvement
    f. Adequacy of administrative facilities
        1) Central Administrative Offices
        2) Building Administrative Offices

This list is not intended to be exhaustive but rather to serve as a guide. Each Superintendent will need to decide if all of the requested data is essential to the review. If not, do not collect the data. If additional data is essential, collect it and place it in its proper place.

THE INTERNAL REVIEW

DATA COLLECTION

INSTRUMENT

Table I

Administrative Demographic Data:
Current Administrative and/or Supervisory Personnel

Staff Category	Men	Age	Academic Prep.	Yrs. Exper.	Summary of experience	Women	Age	Academic Prep.	Yrs. Exper.	Summary of experience	Total No.
Superintendent											
Deputy/Assoc./Asst. Superintendents by Position											
Other Central Office Administrators by Responsibility											
List and identify Administrative Support Personnel											

Table 2

Governing Board Membership History

List all Board members for the past ten years and the dates they served. Are there periods of rapid turnover? Do they coincide with periods of turbulence or serenity?

Names	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19

Table 3

Administrative Turnover History

List all Administrative Positions and the rate of turnover in the last ten (10) years.

Category	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Superintendent										
Deputy Superintendents										
Associate Superintendents										
Assistant Superintendents										
Other Central Office Administrative Positions by Title										

Table 4

Other Employee Turnover History

List the rate of turnover (in percentages) for each building for each employee group for the last ten (10) years.

Bldg. _____

Employee Group	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Teachers										
Other licensed professionals										
Aides by category										
Secretaries										
Cooks										
Custodians										
Other Employee Groups										

Table 5

Student Drop Out Rate History

List the Student Drop-Out Rate by Grade by Building for each of the preceding ten (10) years.

_____
Building

Ten year history ending with the current year

Demography	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Grade 7 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										
Grade 8 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										
Grade 9 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										
Grade 10 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										

Table 5

Student Drop-Out Rate History

List the Student Drop-Out Rate by Grade by Building for each of the preceding ten (10) years.

Building _____

Demography	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Grade 11 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										
Grade 12 Number of males										
Number of females										
Total number										
Percent of total enrollment of sch. bldg.										

Table 6

Non-Public School Enrollment History

List the Number of Students enrolled in non-public schools by building service area by grade for each of the preceding ten (10) years.

Building _____

Ten year history ending with the current year

Grade	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
K										
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										

Table 7

District-wide Employee/Student History by Academic Level

List 10 year employee number in full time equivalents (F.T.E.) and student enrollment history by academic level (Elementary, Middle School or Junior High, Senior High).

Category	Ten year history ending with the current year																			
	19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19	
	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.	# of stu.	# of bldgs.
Student Enrollment by academic level for the District — Elem.																				
MS/Jr.																				
Sr. H.S																				
Totals																				
Superintendent																				
Deputy Superintendents																				
Associate Superintendents																				
Assistant Superintendents																				
Other Central Office Administrators by Title																				
17																				
23																	31			

Table 8

Ethnic Composition by Building History

Building _____ Grade Levels Housed in This Bldg. _____ Total Enrollment of Bldg. _____

Ten year history ending with the current year

Group	19 -19			19 -19			19 -19			19 -19			19 -19			19 -19			19 -19			19 -19			19 -19			19 -19		
	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators	students	teachers	administrators
18																															
									1																						

31

32

Table 9

Employee/ Student/ Building History

Report the following for each building for each of the preceding ten (10) years. (Duplicate these pages so there is one set used per bldg.)

_____ Bldg.

Ten year history ending with the current year

Category	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Capacity of bldg.										
Enrollment by grade level in building: Pre-K										
K										
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
Post-										
Number of Principals										
Number of Asst./Assoc. Principals by title										
Number of other bldg. level administrators and supervisors by title										

Table 2

Employee/Student/Building History

Bldg.

Category

Ten year history ending with the current year

Category	19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19	
	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu
Preschool																				
Kindergarten																				
Grade 1																				
Grade 2																				
Grade 3																				
Grade 4																				
Grade 5																				
Grade 6																				
Grade 7																				
Grade 8																				
Grade 9																				
Grade 10																				
Grade 11																				
Grade 12																				
Counselors																				
Chemical abuse counselors																				
Speech Therapists																				
Psychologists																				

20

35

36

Table 9

Employee/ Student/ Building History

_____ Bldg.

Category — Ten year history ending with the current year

Category	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.	19 -19 # of tchr.	# of stu.
Educationally Mentally Handicapped																				
Learning Impaired																				
Visually Impaired																				
Hearing Impaired																				
Work Experience/OJT Training																				

Bldg.

Employee/Student/Building History

Category

Ten year history ending with the current year.

	19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19		19 -19	
	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# of stu.	# of tchr.	# o stu
Emotionally disturbed																				
Occupational and Physical Therapists																				
Librarians																				
Nurses																				
Other Licensed Staff (list by title)																				

22

39

40

Table 9

Bldg.

Employee/Student/Building History

Ten year history ending with the current year

Categories	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Secretaries										
Bldg, Clerical and instructional aides by assignment										

Table 9

Categories

Ten year history ending with the current year.

	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Custodial/Maintenance Personnel by assignment (deter mine by calculating where the person spends the greater amount of his/her time each day)										
Engineers										
Mechanics										
Carpenters										
Painters										

Table 9

Bldg. Employee/Student/Building History

Categories — Ten year history ending with the current year

	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Glaziers										
Plumbers										
Custodians										
Other Maintenance personnel by assignment										

Table 9

Bldg. [redacted] Employee/Student Building History

Category	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Cooks										
Bakers										
Dishwashers										
Other food service personnel by assignment			1							

Table 9

Employee/Student/Building History

Bldg.

Category

Ten year history ending with the current year.

	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Transportation Supervisors										
Mechanics										
Other Maintenance										
Drivers										

Table 10

District Wide Pupil/Teacher Ratio History

Calculate pupil/teacher ratio by standard formula.

For example: All full time licensed professionals (include counselors, librarians, OTs, etc.; exclude administrators) = 1 Full Time Equivalent (F.T.E.)

1 Special Ed. Teacher = 1/3 F.T.E. (approximate local cost in Minnesota)

1 Educational clerk, secretary and/or intern = 1/3 F.T.E. (local cost is approximately 1/3 the cost of full time teacher) (do not include administrative clerks, secretaries and/or interns)

Or use your local standard for comparison that is appropriate and consistent for your school district.

Ten year history ending with the current year

P/T Ratio (District-wide)	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
Elementary										
Middle School/ Junior High School										
Senior High School										
Other (specify)										

Table 11

History of Pupil/Teacher Ratio by Elementary Building

Name of Building

Ten year history ending with the current year

	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19

Table 12

History of Pupil, Teacher Ratio by Middle School or Junior High School Building

Name of Building	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19

30

55

56

Table 13

History of Pupil/Teacher Ratio by Senior High School Building

Name of Building	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19

Title of Other Facility or Program

History of Pupil/[redacted] for Other Organizational Patterns and/or Groups
(K-6, 7-12, Special Education, Vocational Programs, etc.)

Ten year history ending with the current year

	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19

Table 15

[redacted] Financial [redacted] History [redacted] Fund [redacted]

List the 10 year financial history by fund as of the end of each fiscal year from your auditor's reports.

Funds	Ten year history ending with the current year									
	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19	19 -19
General Fund										
Food Service										
Transportation										
Community Services										
Capital Outlay										
Debt Redemption										
Auxiliary Fund										
Federal Programs										
Unemployment Compensation										
Other Funds (specify)										

Analysis of Standardized Test Scores by Grade Level by Building

Educators have argued for decades that they should not be held responsible for the achievement of their students because they have so little control over them. Hereditary factors, environment, motivation, ambition, personal health and a host of other inter-related factors support or impeded the day to day learning of each student. There are others, however, who claim that organized, intense, goal directed instruction by insightful, competent teachers will enhance the learning of students.

One technique for analyzing the student achievement in a school district is to compare the standardized achievement test scores at comparable grades in each building in the district. Obviously, there will be diversity in the range of test scores. This diversity, however, should be able to be partially accounted for as a result of the environmental or sociological milieu, as a result of the educational system or as a result of some other definable influence within the total student environment.

Low general achievement in one building, for example, may indicate that special programs and/or staff with special skills should be added to a specific school building but not to other buildings.

Complete the following Standardized Achievement Test Scores by Grade by Building table. Compare buildings to ascertain if there are apparent strengths or correctable weaknesses at various buildings.

Table 16

Most Recent Standardized Achievement Test Scores by Grade by Building
(Use one of these forms for each building report)

Name of Building_____

Grade Level	Average or Mean IQ	Grade expectancy	Subject Area Scores (Insert the areas tested in your school district if they are different from those listed.)									
			Vocabulary	Reading Comprehension	Word Study Skills	Spelling	Language	Math Concepts	Math Computation	Math Application	S.A.T. Scores	
											Verbal	Math
K												
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												

Table

History of Courses/Activities Dropped and/or Added

List, chronologically, the courses/activities dropped and/or added in the last five years.

Dropped			Added		
Course or Activity	Date	Cost	Course or Activity	Date	Cost

66

67

Table 10

Future Plans - Courses/Activities to be Dropped and/or Added

List, chronologically, the courses/activities you plan to drop or add in the next five years.

Drop			Add		
Course or Activity	Date	Cost	Course or Activity	Date	Cost
37					
				63	
63					

Table 17

Long Range District Wide Enrollment Projections

Five year projections beginning with the end of the current year

Enrollment					
Elementary					
Middle School/ Junior High School					
High School					
Other Organizational Patterns (specify)					
				71	
70					

Table 20

Long Range Enrollment Projections by Building by Grade Level

Bldg _____ Five year projections beginning with the end of the current year

Grade	19 -19	19 -19	19 -19	19 -19	19 -19
Preschool					
Kindergarten					
Grade 1					
Grade 2					
Grade 3					
Grade 4					
Grade 5					
Grade 6					
Grade 7					
Grade 8					
Grade 9					
Grade 10					
Grade 11					
Grade 12					
Post High School					
Total					

Table 21
Long Range Financial Projections

Five year projections beginning with the end of the current year

	19 -19	19 -19	19 -19	19 -19	19 -19
General Fund					
Food Service					
Transportation					
Community Services					
Capital Outlay					
Debt Redemption					
Auxiliary Fund					
Federal Programs					
Unemployment Comp.					
Other Funds (specify)					

Table 21
Long Range Financial Projections

Five year projections beginning with the end of the current year

	19 -19	19 -19	19 -19	19 -19	19 -19
Other Funds					

YOUR ADMINISTRATIVE PHILOSOPHY AND PROCEDURES

Listed below are a number of statements regarding administrative philosophy and practices which are generally held to be valid and to which the school community should address itself.

Indicate by circling the appropriate number in the first column to the right of each statement the degree to which you agree with the premise and indicate by circling the appropriate number in the second column the degree to which you believe that premise is implemented in your school district. Where necessary, in order to be consistent with your stated district philosophy and objectives, premises may be modified and others added.

The descriptions of the numbers listed immediately below apply to the numbers in the columns to the right of the premises and should be borne in mind when marking your level of agreement and your level of implementation.

Level of Your Agreement	Level at Which You Feel Each is Implemented
1. Disagree	1. Not implemented
2. Questionable	2. Weakly implemented
3. Agree with reservations	3. Average implementation
4. Agree in general	4. Strongly implemented
5. Agree completely	5. Fully implemented

Statements	Your Level of Agreement	Your Level of Implementation
1. Full responsibility for the administration of the overall educational program is vested in the administrative head of the school district who serves as administrator for, and executive officer of, the governing board of the district.	1 2 3 4 5	1 2 3 4 5
2. The governing board provides leadership for the acquisition of facilities and equipment, and for time, funds, and leadership personnel for implementing a desirable educational program.	1 2 3 4 5	1 2 3 4 5
3. The administrative staff of the school, through cooperation with the central office staff, is responsible for providing a climate within which meaningful innovation and reasonable experimentation are encouraged.	1 2 3 4 5	1 2 3 4 5
4. In districts with more than one school building, there exists an effective delegation of authority to bldg. principals and a democratic relationship between the central office administrators and the building principals.	1 2 3 4 5	1 2 3 4 5
5. The primary responsibility of the building principal is to the educational program. His/her responsibilities include leadership in the supervision and improvement of instruction, effective staff utilization, and coordination of efforts to establish and maintain good community relations.	1 2 3 4 5	1 2 3 4 5
6. The superintendent delegates responsibility and authority as appropriate in providing professional leadership in the school.	1 2 3 4 5	1 2 3 4 5
7. The superintendent keeps him/herself well informed of educational developments that will enable him/her to provide dynamic leadership.	1 2 3 4 5	1 2 3 4 5
8. The superintendent encourages and motivates each administrator in his/her school system to achieve his/her highest degree of administrative potential.	1 2 3 4 5	1 2 3 4 5

Statements	Your Level of Agreement	Your Level of Implementation
9. The superintendent coordinates efforts to obtain maximum utilization of:		
a. existing facilities	1 2 3 4 5	1 2 3 4 5
b. equipment	1 2 3 4 5	1 2 3 4 5
c. administrative time	1 2 3 4 5	1 2 3 4 5
d. administrative talent	1 2 3 4 5	1 2 3 4 5
e. materials	1 2 3 4 5	1 2 3 4 5
10. The governing board encourages all administrators to participate in professional activities on local, state, regional, and national levels.	1 2 3 4 5	1 2 3 4 5
11. The principals actively participate in the recruitment, selection, and assignment of school staff.	1 2 3 4 5	1 2 3 4 5

Your Analysis of the Administration and
the Administrative Procedures
for Your Total District

Consistency of philosophy, objectives, policies and procedures:

A. Are the policies and procedures of the central administrative staff consistent with the philosophy and objectives of the school? List areas of consistency and of inconsistency.

B. Are the policies and procedures of the building administrators consistent with the philosophy and objectives of the school? List areas of consistency and of inconsistency.

C. Are the individual and collective goals of each staff consistent with the philosophy and objectives of the school?

1. Licensed professional

2. Secretaries

3. Aides

4. Custodial/maintenance

5. Cooks

6. Others (list by group)

Non-Discrimination:

A. Does the district have a recruitment and selection program that complies with the letter and the intent of your State and Federal equal rights laws and regulations? Attach a copy of your policies and procedures.

B. Does your school district administrative structure meet the criteria established by your State and Federal laws and regulations for equal treatment of women and minorities? If the answer is no, describe needed adjustments to your present procedures.

Your Analysis of the Administration
and Administrative Procedures
for each building

Administrative Task Analysis:

List the administrative and supervisory tasks that must be accomplished in each building.

Building Name _____

Task	Administrator or Supervisor Responsible for the tasks

Administrative Organization and Sufficiency:

A. Is the administrative staff of the school district organized to meet the administrative needs as expressed in the district philosophy and objectives? Explain.

B. Is the administrative staff sufficient in numbers to meet the responsibilities inherent in each task? If the answer is no, describe needed services.

C. Does the administrative staff have adequate support staff? If the answer is no, describe needed support staff.

Administrative Responsibilities:

Describe how each building administrator fulfills his/her responsibilities for:

A. Teacher supervision and evaluation. Attach the evaluation forms used for teacher supervision and evaluation at each building.

B. Leadership in curriculum development.

C. Supervision of students.

D. Fiscal management

E. Give specific examples for each building that demonstrate that educational innovation and experimentation are taking place.

Communication/Decision Making/Orientation:

A. What methods are used to facilitate communication and decision making between/among administrators?

B. How do the central office administrators communicate with employees?

C. How do the central office administrators communicate with the community?

D. How does the Superintendent communicate with the Board? Attach sample copies.

E. List procedures used by the Superintendent for new board member orientation. Attach orientation materials.

F. List the procedures used by central office administrators to orient new employees to the school and to their new responsibilities.

G. How do the building administrators communicate with employees?

H. How do the building administrators communicate with the community?

I. List the procedures used by building administrators to orient new employees to the building(s) and to their new responsibilities.

Inservice Activities:

A. Does the school district support an inservice program for school board members? Explain.

B. Does the school district support an inservice program for central office administrative staff members? Are central office administrative staff members required or encouraged to participate? Explain.

C. Does the school district support an inservice program for building level administrators? Are administrators required or encouraged to participate? Explain.

D. How do central office administrators encourage the professional growth of employees and help them develop a high degree of competency?

1. Elementary licensed professional personnel (not the administrators)

2. Middle School/Junior High School licensed professional personnel (not the administrators)

3. Senior High School licensed professional personnel (not the administrators)

E. How do the central office administrators encourage inservice growth of non-licensed personnel by area of responsibility, i.e.: nurse, nurse's aides, secretaries, educational aides, custodians, cooks, etc. Are the above required or encouraged to participate? Explain.

F. How do the building administrators encourage the professional growth of employees and help them develop a high degree of competency?

1. Licensed professional personnel

2. Non-licensed (non-professional) personnel by area of responsibility, i.e.: building aides, clerical aides, instructional aides, nurses aides, secretaries, cooks, custodians, etc.

Professional Growth of Administrators:

List the professional development activities of each administrator for each of the past five years in the areas of:

_____
Name of Administrator

1. Active participation in professional organizations.

This year
19___-19___

19___-19___

19___-19___

19___-19___

2. Expanding professional competency through additional study. (List specific examples.)

3. Other examples of professional growth. (Be specific)

Plans for Improving Administrative Effectiveness:

A. List below, the short-range plans for improving the effectiveness of the administrative staff of the school. Be specific.

B. List below the long-range plans for improving the effectiveness of the administrative staff of the school. Be specific.

C. What other improvements do you recommend in order to make the administrators of this school district optimally efficient and effective? If any of these recommended changes seem unattainable by your school district, give reasons why.

Administrator Salaries:

Are administrative salaries comparable to those being paid for similar positions in the area? If not, list the areas of significant discrepancy (both higher and lower). Provide a copy of the administrative salaries by position.

Administrator Evaluation:

A. Describe the methods used for evaluation of central office administrators. Attach copies of the evaluation forms for each administrator.

B. What procedures and practices are used in the continuous evaluation of the efficiency and effectiveness of each building administrative staff member. Attach the evaluation form used for each administrative position.

Problem Identification and Solution:

A. To what extent are the central office administrators identifying problems and seeking their solutions? List each central office administrator by position (and name, if you wish) and cite examples of problem identification and solution.

B. To what extent are the building administrators identifying problems related to the organization and operation of the school and seeking their solution? List each administrator by position (and name, if you wish) and cite examples of problem identification and solution.

Administrator Effectiveness:

A. In what areas are the building administrators most effective? List each administrative position (and name, if you wish) and cite specific examples of effectiveness.

B. List those areas where the effectiveness of each building administrator could be strengthened. List each administrator position (and name, if you wish) and cite specific areas that could be strengthened.

Staff Effectiveness:

A. How effectively does each staff meet the needs of the school?

1. Licensed Professionals

2. Secretaries

3. Aides

4. Custodial/maintenance

5. Cooks

6. Others (list by group)

B. Judge how effectively each staff group is contributing to the successful identification of problems and working toward their solution?

1. Licensed professionals

2. Secretaries

3. Aides

4. Custodial/maintenance

5. Cooks

6. Others (list by group)

Curriculum Improvement:

A. Chronologically list the improvements in the instructional and support services that have been completed within the last three years?

B. List the areas of special strength in the instructional and support services?

C. List those areas of the instructional and support services which are in need of strengthening?

D. Explain how you make certain all components of the curriculum are systematically reviewed, evaluated and modified. (Attach any appropriate materials.)

E. List below, in anticipated sequence, the short-range improvements planned for the instructional and support services. Be specific.

F. List below the long-range improvements that are planned for the instructional and support services. Be specific.

G. What other improvements do you recommend in order tomake the instructional and support services optimum for this school district? If any of these desirable changes are unattainable by your school district, give reasons why.

Program Support:

A. Cite evidence that the board provides facilities, equipment, time, funds leadership personnel and support personnel for providing a high quality, comprehensive educational program. Also list areas of need.

B. What procedures are used for the systematic evaluation, revision and implementation of changes in support services?

Service to Community Groups:

A. How does the central administration work with parent-teacher groups, parent advisory committees (PAC), and other organizations to improve the services rendered to residents of the community?

B. How do the building administrators work with parent-teacher groups, parent advisory committees (PAC) and other organizations to improve the services rendered to residents of the community they serve?

Your Critical Analysis of Your School District's Administrative Facilities

Complete the following critical analysis of your facilities to determine if they are adequate in size and location to support an efficient, centralized administrative organization and staff in your school district.

Central Offices:

A. Are the following areas of the central office physical facility adequate in size and design to meet the administrative needs of the district? Be specific. Analyze each facility by use, assets/deficiencies.

1. Central Administrator Offices

2. Central office administrator support service areas

3. Other offices

4. Workrooms

5. Conference rooms
   a. Small group
   b. Large group

6. Meeting rooms (large group/small group)

7. Refreshment facilities

8. Restrooms for administrators and their staffs

9. Permanent, fireproof, secure storage facilities

10. Supply storage facilities

11. Climate control: adequacy of heat, light, air conditioning, air circulation and exhaust

B. What continuous evaluation procedures are used to ensure that the best possible use is being made of the existing facilities?

C. What plans do you have for improving the facilities to enable your district administrative staff to be more efficient?

Building Administrator Offices: (use 1 set of these forms for each building)

A. Are the following areas of each building administrative facility adequate in size and design to meet the administrative needs of that building. Be specific. Analyze each building facility by its use, assets and deficiencies.

Building Name _____ Academic Level _____

1. Administrator offices

2. Administrator support service areas

3. Other offices

4. Workrooms

5. Conference rooms
   a. Small group
   b. Large group

6. Meeting rooms (large group/small group)

7. Refreshment facilities

8. Restrooms for administrators and their staffs

9. Permanent, fireproof, secure storage facilities

10. Supply storage facilities

11. Climate control: adequacy of heat, light, air conditioning, air circulation and exhaust

B. What plans do you have for improving the facilities to enable your building administrators to be more efficient?

Summing Up the Internal Review

When all previous data has been collected and recorded and the opinionnaire completed, you are ready to review the materials. As you do so, consider:

1) Is there an obvious, appropriate organizational management structure ?

2) Does this structure provide a means for effective, efficient communication and delegation of responsibility and authority?

3) Are there areas of responsibility that are unassigned?

4) Have the areas of responsibility been assigned to the most logical person and the person with the most talent in that area?

5) What does a review of the enrollment, staffing and financial data reveal?

   a. Should some school buildings be closed or partially closed or others built or expanded?

   b. Is the transportation network efficient?

   c. Are the staffing levels (P/T ratio, custodians, cooks and other) support personnel) in each building similar? If not, can the variance be justified on the basis of program, clientele or in other ways?

   d. Do the standardized rest scores reveal a need for greater emphasis at any level and/or building?

If you plan to use only the internal review, list the areas in rank order that need improvement and/or updating. Reprioritize this list into 3 new rank ordered lists: 1) possible within the limits of time and finances; 2) probably within the limits of time and finances; and, 3) improbable within the limits of time and finances.

Select initial project(s). Set check points and completion deadlines. Organize yourself and your staff. BEGIN your improvement program.

In chronological order of importance, list the areas you believe should be improved.

Describe What You Will Do to Improve Your School

For example:

1) If you believe the management computer system could be improved, describe what computer services are needed.

2) If you believe the administrative structure of your school should be reorganized, diagram the administrative structure you would propose.

THE EXTERNAL REVIEW - AN OVERVIEW
An Outside Team of Peers, University Professors, and Colleagues Look at Your School Operation

The external review is not an absolute necessity to securing benefits from the internal review procedure. It does, however, provide an opportunity for you to secure the expert opinions of colleagues about your operation. It may validate your current ideas and procedures. It provides a structure for you to secure objective suggestions for change and improvement. The decision to use the external review component is a local decision.

There will be some cost for this committee. Each local Superintendent will need to establish the financial arrangements with his/her Board as (s)he organizes the committee. Persons who currently serve on the validating teams for Regional Accreditation Associations such as the North Central Association of Colleges and Schools do so as unpaid volunteers. If not, an honorarium should be agreed upon before the review committee membership is finalized. The local school provides all materials and supplies, meals, mileage and hotel costs. The cost of typing, copying and mailing the final written report should also be the responsibility of the District being reviewed. This cost should be agreed upon by the Committee Chairperson and the Superintendent before the Review is conducted.

It is absolutely essential that the internal review preceded the external review process. The external school management review process is essentially similar to the validation team review process currently used by most regional accrediting associations such as the North Central Association of Colleges and Schools. You may be able to secure assistance through your State Superintendents' Association in selecting a Review Committee or you may wish to select a group of approximately five peers, university professors, colleagues and others on your own. Let us assume, however, that your state has no administrative organization upon which to draw for this particular type of service. If that is the case, you must first complete steps one through four of the internal review procedure. Simultaneously or very soon after beginning step two, you should determine who you would like on the external review committee and should select the chairperson for the committee. You may also wish to have area chairpersons for facilities, financial control and M.I.S., administrative organization, delegation of responsibility and authority, job descriptions, goals and objectives, evaluation procedures and educational leadership. The exact committee membership and its organization and the number on the committee are at the discretion of each local school superintendent.

Each member should have received and reviewed the list of committee members and all demographic and operational data before arriving. The chairperson should visit the school prior to the Review Committee's visit. (S)He should spend adequate time on site to become acquainted with the administrative staff and organization, the physical facilities and the arrangements made for the Review Committee. (S)He should discuss the committee visit with the Superintendent to determine if there is any additional information that will be needed by the Review Committee. Arrangements for accommodating the Review Committee's needs should be discussed and a schedule of the Review Committee's activities should be established.

You should plan to have the review committee on your site at least 2-3 full days talking with you, your administrators, your non-licensed district level staff, board members, community members and others. The Host Superintendent may wish to entertain the Review Committee and members of his/her Board and administrative staff at an evening dinner or at a breakfast prior to the time the actual review activities begin. This would provide an excellent opportunity for the Superintendent, Board and Administrative Staff to get acquainted with the members of the Review Committee and to provide all Committee members with a brief overview of the total operation. This could, and probably should, include a report on the number and kinds of educational programs available, student standardized test scores, and other programmatical and management data.

The Chairperson will assign specific members of the committee the responsibility for reviewing:

1. Management philosophies and personnel procedures
2. Financial and student data
3. Personnel supervision and improvement
4. Facilities

Other additions, subtractions or combinations may be more appropriate in some school districts. If so, the area assignment adjustments should be made. Following the assignment of responsibilities, the individual committee members should be able to meet with the Superintendent and/or any members of his/her staff to ask any questions and to clarify the demographic and operational data as needed.

THE EXTERNAL REVIEW COMMITTEE'S ACTIVITIES

The Review Committee members are expected to visit most, if not all, the people in the assigned areas. The size of the Committee and the size of the school system will dictate the extent to which this goal is achievable. The Review Committee members should use their time to observe and ask questions about what is being done and how it is being done in the school being reviewed, not to tell what the Review Committee member does in his/her home situation.

The External Review Committee's Reports

The Review Committee should schedule its activities so that it can meet as a total committee under the direction of the Chairperson approximately 4 hours prior to leaving the host school. Each area of responsibility should be verbally discussed and general consensus reached regarding the content of the area/category final written report. A written report should be submitted to the Chairperson of the Review Committee by each subcommittee chairperson for editing and integration into a final written report that will be provided to the Superintendent within 4 weeks after the on-site visit.

The report to the Review Committee Chairperson should contain:

1. A brief description of the area reviewed;
2. The observed strengths in each of the areas;
3. The observed weaknesses, questions and concerns in each of the areas; and,
4. Recommendations for improvement to be considered by the Superintendent and his/her administrative staff and Governing Board.

The Verbal Exit Report

The verbal exit report should be presented to the Superintendent and the persons of his/her choice by the Chairperson of the Review Committee as the Review Committee is about to leave the local school district. The report should include the general highlights of the review, some of the observed strengths, some of the most apparent weaknesses and a few general recommendations. It should be emphasized that a more detailed Review Committee written report will be submitted to the Superintendent within approximately four weeks.

The Review Committee Written Report

The Chairperson of the Review Committee is responsible for preparing the final written report that will be sent to the Host Superintendent. (S)He should make certain the report contains an introduction, a listing of any special responsibilities the Committee was asked to address, the general commendations of the Committee and the general recommendations of the Committee. The remainder of the written report should contain each area Chairperson's report as edited by the Review Committee Chairperson. Each should contain a brief introductory statement and description of the area reviewed, a list of the observed strengths, a list of the observed weaknesses and concerns and a list of recommendations.

The Review Committee Chairperson is singularly responsible for the grammatical accuracy, structure and neatness of the final written report that is sent to the host school Superintendent. The respect with which the contents of the report are perceived by the host Superintendent will be directly related to the accuracy and neatness of the report. A precise, accurate, neat report will reflect an accurate, insightful Review Committee visit. A sloppy, inaccurate report will imply a sloppy, ineffective Review Committee visit and will be perceived as a waste of valuable time, effort and finances.

The written report will, in many states, become a public document when it is received by the host Superintendent. It should, therefore, insofar as possible, be written in clear, concise, simple language that can be understood by Governing Board members and other members of the general public.

SAMPLE EXTERNAL REVIEW COMMITTEE WRITTEN REPORTS

Name and Address of School District

REPORT OF THE EXTERNAL REVIEW COMMITTEE

Date of Visit

Name of Committee Chairperson, his/her vocational responsibility

List of Committee Members and their vocational responsibilities

The external review of _____ School District was preceded by a careful internal review by the Superintendent, his/her administrative staff and the Governing Board under the direction of _____.
(Superintendent)

The internal review suggests that significant amounts of careful research have gone into the internal review process. The leadership provided by the Superintendent and the understanding exhibited by the administrative staff and governing board tend to indicate that the total management of this school district will strive for continuous management improvement.

Many of the concerns expressed and recommendations made in this report have already been anticipated by the administration. All suggestions and recommendations made in this report and all questions raised are offered with great respect for what the administration is currently accomplishing. It is realized that some recommendations can be acted upon very soon, that some represent long-range goals, and that some may not be accepted. In some cases, the review committee may not have fully understood a situation or a problem. If this is so, it may indicate a need for further study and clarification on the part of the administration. The committee believes that all phases of its report are worthy of serious consideration by the administration and governing board.

The committee was impressed by the obvious dedication, ambition, enthusiasm and morale of the administrative staff. There was significant evidence of achievement of many of the goals of the district.

It is generally recognized that the quality of each school district is a reflection of its management by the governing board, the superintendent and the other members of the administrative staff. This school district reflects strong, dedicated, competent management at all levels. In addition to the many excellent management practices observed in your school district, this External Review Committee respectfully submits the following recommendations for your consideration.

Organizational Management Structure
(Components to be managed, job descriptions, evaluations, leadership identification and supporting physical facilities)

The above areas are frequently difficult for a governing board and administration to overtly address because, although they are the very foundation of the successful delivery of educational services to students, they are frequently perceived by the general public and the non-central administrative staff as a voracious consumer of physical and financial resources that would be better used if assigned to services at the student level.

After an intensive review of the above described areas, the External Review Committee unanimously supports submission of the following:

Strengths:

1. All of your school administrators are highly educated. Each has had broad school administrative experience.

2. The Governing Board seems well informed. Each member expressed sincere interest in supporting a broad, deep, high quality educational program.

3. An organized inservice program for administrators was evident. It enables individual administrators to develop expertise in areas of interest in addition to providing specific inservice activities for all administrators.

4. The job descriptions and evaluation forms for each administrator have been reviewed and updated within the last year.

5. An attitude of respect and collegialiality between members of the building administrative staff, the central administrative staff and the superintendent was evident.

Weaknesses/Concerns:

1. It appears the central office component of the school district's administrative structure is seriously under-financed.

2. It did not appear that sufficient central office staff had been provided to adequately meet the demands of developing and implementing carefully conceived short and long range management plans.

3. The size and location of the central administrative facilities necessitate the housing of central office administrators in various other buildings scattered throughout the district. It appears this lack of centralization has caused unnecessary central office administrative coordination and communication problems. It also appears that financial economies could be achieved in the number and use of secretarial and other support personnel if all central office administrators could be officed in a single, adequate facility.

THE FOLLOWUP

The Superintendent should provide individual copies of the internal and external review materials to his/her administrative staff and the Board. The administrative staff should be divided into categories in the same manner as the external review committee. The Administrative Staff Committees should select a chairperson who will be assigned the responsibility to direct his/her committee to analyze the internal and external review reports and develop short and long range plans for improving management in the assigned areas. Each area chairperson, and the Superintendent, should use the area plans to develop an articulated, district-wide management plan containing achievable short and long range goals. After the Superintendent is satisfied that the district-wide plans are complete and appropriate, (s)he should provide them to the Board for review, discussion, consideration and, eventually, adoption.

BENEFITS TO YOU AND YOUR SCHOOL

By following the previously described internal and external review processes, you and your staff will have analyzed your total purposes, your educational outcomes, your staffing, your facilities and your management system. As a result, you and your staff should be able to develop short and long range strategies for further improving your school management procedures. Your administrative staff should have a better understanding of the total administrative needs of the district and, therefore, should be better administrators. Your short and long range plans should provide a guide for present and future direction for your current and future School Boards. There should, of course, be the inherent latitude for continuous review and modification.

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